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USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 10/24/2003

GAIN Report Number: HR3020

Croatia

Exporter Guide

Annual

2003

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Report Highlights:
Croatia imports a significant portion of its food consumption. The prospect of EU accession, the growth in tourism, and continued economic reform could make Croatia a significant long-term importer of some U.S. food products, including seafood, wine, pet food and consumer food products. Croatian imports of consumer food items have almost doubled from $267 million in 1993 to $498 million in 2001. Croatian consumers are anti-biotech and U.S. meat products may not currently be exported to Croatia due to a lack of negotiated USDA/FSIS meat export certificates

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Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Vienna [AU1]
[HR]

I. Market Overview

Economic Situation

Croatia faces economic challenges stemming from a history of communist mismanagement, damage from the war in the mid 1990's, and the government's unwillingness to tackle some difficult privatization and labor issues. There is a good possibility that Croatia becomes EU candidate country in 2003, which should help the government focus its economic reform efforts. Croatia is a member of the WTO and until 2003 had signed at least 31 bilateral trade agreements in an effort to liberalize trade.

For 2003, real GDP is predicted to grow around 4.2 percent and the official unemployment rate will remain a bit over 20 percent. Per capita GDP is over $5,000 but reductions in government spending and only minimal increases in wages will act to slow down consumption growth. Import demand will remain strong and is driven by both investment and consumer demand. The Croatian currency, the Kuna, is stable. Exchange rates have been fluctuating between 7.05 and 6.54 Kuna to the dollar for the first five months of 2003 because of the dollar's slide. Inflation in 2002 was 2.2 percent and it is expected to be 2.3 percent in 2003. Foreign currency earnings through tourism will keep the account deficit from rising significantly. Gross foreign debt in 2002 is estimated to be around $15.2 billion or more than 60 percent of 2002 GDP and it can be expected that this percentage will increase in 2003.

Demographic Developments and Their Impact on Consumer Buying Habits

Croatia's population is about 4.4 million and is stable. The age distribution is as follows: 0 to 20 years/23.8 percent; 20 to 65 years/60.5 percent; 65 and over/15.7 percent (2001 census). The number of elderly and retired is rising but they tend to have small pensions - the elderly are not the economic force they are in other countries. On average, only one person in three within a household is employed.

Food Expenditures

Total personal consumption in 2001 was Kn 61,141 ($7,332). In 2001, personal consumption for foods and beverages was 33.67 percent of total personal consumption. This is a decline of about 4.5 percent from 1998, but a 1.5 percent raise when compared to 2000. Alcoholic beverages and tobacco in 2001 took 4.07 percent of total personal consumption, which is a 0.54 percent decline when compared with 1998, but a 0.18 percent raise when compared with 2000.

Size and Growth of the Consumer Foods Market

General

In 2001, the value of the food retail sector was 43,400,000,000 Kn ($5,100,000,000) including VAT, which corresponds to more than two-thirds of total retail trade. Comparing 2001 with 2000, sales rose 9 percent; however, sales growth for the previous year was nearly 100 percent. In 2002 total retail trade was Kn 180.1 billion ($22.9 billion).

Last year, Croatia imported agricultural products and food valued at $999,777,417 and exported only $557,951,907. The Export-Import deficit in 2002 was$ 441,825,510, which is 18 percent more than in 2001. Imports for 2003 are expected to be at the same level or higher. This was the reason for the Croatian Chamber of Economy to start a promotional campaign called "Buy Croatian". There is little specific data on sales of food products by class or type.

Beverages

Total beverage (including alcoholic drinks and excluding cocoa) imports in 2002 were about $78.3 million, which is 13.8 percent more than in 2001.

In 2001 consumption per household member was:

- coffee 3.59kg ,
- tea 0.62kg ,
- cocoa 0.24kg,
- mineral water 30.27kg,
- soft drinks 12.48kg,
- fruit juices 13.39kg,
- syrups and concentrates 5.68kg
- spirits 0.73l
- wine 10.96l
- sparkling wine 0.02l
- beer 27.90l

Mineral water

According to the association of water and soft drink producers, mineral water consumption in first six mounts of 2003 was 148.486 million liters. From that number 115.231 million liters is from domestic production, which is 5 percent more than in the same period last year. Imported mineral water accounts for 10.590 million liters, which is 80 percent more than last year. Spring water accounts for 25.965 million liters, which is 80 percent more than last year.

Chocolate

According to some researches from February 2002 till February 2003 retail trade (excluding cash & carry stores) sold 1,589 MT of chocolate bars (Snickers bars, Twix bars, Mars bars, etc…) or Kn 127.5 million ($ 16.21 million). Top 5 brands in 2002 were: Kinder, Bananko, Mond, Twix, Snickers. They form 64 percent of the market. Chocolate bars are only 1/5 of total Croatian chocolate consumption in one year.

Food service (Restaurants)

Hotels and restaurants in 2001 sold foods, non-alcoholic and alcoholic drinks valued at $360,389 Sales in this sector have been stable over the last four years. (See HR 3008 for more information)

About 18 percent of young employed Croatians regularly consume fast food.

Pet Food

Recently the Croatian pet food market has grown, as indicated by rising imports of dog and cat food. In 1999. imports of dog and cat food were $10.72 million and in 2002. were $17.64 million. Trade data indicate that only a small percentage of pet food imports come directly from the United States, but U.S. brands are common and several are made with U.S. ingredients in Western Europe. Future growth is expected as the population ages and standards of living rise. (See HR 2010 for more information.)

Seafood

In spite of Croatia's lengthy Adriatic coastline, the country is struggling to catch and produce seafood. Croatia lacks modern vessels as well as the infrastructure needed to transport and process seafood. Meanwhile the demand for seafood is increasing as Croatia becomes a more popular tourist destination. This could make Croatia an excellent market for U.S. seafood. Fish consumption in 2001, according to Croatian statistical institute, was 10.4 kilograms per capita (this means that seafood consumption in 2001 was about 9kg), which is 7.2 percent increase when comparing with 1999. Total imports of fish in 2002 were $66 million. Of this, $25.8 million was frozen fish, a 51.8 percent increase over 2001. (See HR 2002 for more information.)

Tourists that come to Croatia expect seafood but Croatia suffers from a shortage of domestically caught fish. Thus, there are export opportunities for U.S. suppliers of seafood, especially for the tourist trade. (See HR 2002 for more in the Croatian market for seafood)

Advantages and Challenges of U.S. Suppliers on the Croatian Market

Advantages	Challenges
Growth in tourism	Negative attitude towards foods containing or made from genetically modified organisms
Urban population growing	Reservation towards products with chemical food additives
An aging population	U.S. food products are at a tariff disadvantage compared to goods from the EU, EFTA or CEFTA countries
Certain fruits, vegetables, dried fruits and rice are not produced domestically	High shipping costs
Shortages of some agricultural products like beef, pork, soybean meal, and certain types of sea food	Lack of awareness of U.S. goods; no concept of U.S. quality by consumers
Most importers speak English	The government is beginning to adopt restrictive EU Phytosanitary regulations

II. Exporter Business Tips

Local Business Customs

Food retailers buy domestic and imported products from wholesalers. For the most part, the wholesale sector is completely privatized. Restructuring of the retail segment also occurred as retail chains were privatized and acquired by larger groups and new private retailers emerged on the market. The retail sector is dominated by private companies like Getro, Konzum (Agrokor), Diona (Globus Holding) and Prehrana (Brodokomerc). Foreign retailers (Billa, DM, Merkur, Mercatone, Euroviba, Metro, Merkator, King Cross, Ikea, etc.) have started to enter the market as well, creating more competition. Large supermarket chains have their own purchasing sections that buy, store, and distribute foodstuffs centrally. These purchasing units also carry out imports. However, some items are purchased through specialty wholesale importers. In an effort to become more competitive with the consolidating retail food sector, last year 800 Croatian shops merged purchasing departments into purchasing groups called CBA and Ultra. There are 7,500 retail outlets of all types in Croatia. It is estimated that 4,500 small stores were closed in 2002 because of the inability to compete with supermarket chains.

General Consumer Tastes and Preferences

Croatians, in general, reject food that contains or is made from genetically modified organisms (GMOs). According to some newspaper polls, 80 percent of the population is opposed to the technology. Consumers generally will not buy food containing GMOs even if it is considerably cheaper. (See HR 3019 and HR 1008 for more information on GMOs in Croatia.) Demand for health foods is also increasing from a modest base and one Internet poll showed that 24 percent of respondents eat organic food (note: this poll was informal).

Consumption of "light" or dietary products is increasing. Sugar free chewing gums are more popular than gums with sugar. Croatians prefer fresh milk, powdered or heat treated. They prefer edible vegetable oil to animal fats, and chocolates to other sweets. Smoked and salted meats are popular.

Food Standards and Regulations

See the Agricultural Import Regulations and Standards Report (HR3012) for information on standards and regulations.

General Import and Inspection Procedures

After goods arrive in a customs storage warehouse, the importer (or a freight forwarder) begins the customs clearance process. Samples for quality control are taken for all shipments. Based on a history of acceptable imports, a border inspector (sanitary or veterinary) may only inspect periodically, usually every three months. Fees for product inspection must be paid by the importer. Custom import documents may be in English.

Required documents for meat imports may be found at:
http://www.veterinarstvo.hr/import/index.htm

Customs rates and documents for initializing procedure for goods clearance can be found at: http://www.carina.hr (since this web site is in Croatian only, contact your Croatian partner or freight forwarding companies for clarification).

III. Market Sector Structure and Trends

Retail Sector Key to High Value Imports

The internationalization of the Croatian retail food trade started in 1997, with the opening of the supermarket chain (Drogerie Markt). In 2001 trade participated in BDP with 11.8 percent, which is a 3.5 percent growth from 1999, and continues to increase. In the first four months of 2002 small domestic traders had a 45 percent share in total domestic trade, which is 23 percent less that in 2000. In the same time supermarkets jumped from 18 percent trade market share in 2000 to 37 percent in the first four mounts of 2002.

Croatia's total imports of consumer foods has almost doubled, from $267 million in 1993 to $498 million in 2001 and still growing. Increasingly, imports are being distributed through large (multinational) supermarkets. (See HR 2008 for more information on the Croatian food retail sector.)

Promotion and Marketing Strategies

Television is the food industry's favorite media. Supermarkets also send flyers or newsletters by mail and sometimes promote themselves using consumer participation contests on TV and radio. A media campaign is considered necessary for the success of any new food product.

Tourism Sales

In 2001, tourism accounted for 16.3 percent of Croatia's GDP, 34.7 percent of total exports and 68.8 percent of total services exported. Although, number of tourists in 2001 declined worldwide Croatia had 10 percent increase in tourist arrivals and overnight stays when comparing with 2000. In 2002 Croatia had 44.7 million overnights, which is 3 percent more than in 2001. Total revenue from international tourism in 2002 was $3.8 billion, which is 14 percent growth comparing with 2001. (See Hr 3008 for more information on HRI and food service sector)

The majority of tourists come form Germany, Slovenia, Italy, and the rest from Czech, Austria, Poland, Hungary, Netherlands, Britannia and Slovakia. Croatia offers summer and winter tourism, nautical, ecological, hunting, fishing and country tourism.

Internet Sales

The popularity of the Internet in Croatia is growing fast and in 2001 sales jumped to Kn14 million ($1.7million), which is 700 percent more than in 2000 but still a very small amount when compared with total retail sales. Growth in 2002 and 2003 is expected to keep the same pace. Most of the Internet shopping includes the following: travel services, IT equipment, books, and electrical appliances. Despite this, there are a few companies providing online sales of retail food products. These companies are following: www.maxidiskont.hr (groceries that are delivered only in Zagreb region), www.vivatpartneri.hr (wine sales, but it is more for promotion purposes than for sales), www.puljanka.hr (groceries delivered in some parts of Istra).

IV. Best High Value Product Prospects

The consumer food/edible fishery products that offer the best U.S. export opportunities are as follows:

Product Category	2001 Market Size	5-Yr. Avg. Annual Import Growth (1997-2001)	Import Tariff Rate 2003	Key Constraints Over Market Development	Market Attractiveness for USA
Fish & Sea Food	47,164MT	216.44%	from 5% to 22%	Competition from some E.U. seafood exporting countries.	Demand and consumption should continue to grow along with tourism for the next several years.
Snack Food	without domestic production 17,829MT	77.28%	from 13.8 % to 36 % , 10+117€/10kg Max 37.5%	Future GMO labeling and competition from E.U. and Croatian franchisees.	Growing market.
Pork	107,714MT	-13.83% drop in imports was due to FMD	From 10+51.6€/100kg Max 38.5% to 10+70.8€/100kg Max 37.5%	No negotiated USDA/FSIS certificates (mandatory Trichinosis	Croatian meat processors are importing significant

		issues		testing).	quantities of pork because an overall deficit in quality production.
Pet Food (Dog & Cat Food)	14,864MT	85.29%	5%	Competition from European companies and U.S. franchisees in European Union.	Croatia doesn't have pet food production and usage of these products is expected to grow with increase in standard of living.
Wine	189,000,000liters + 5.944MT	32.39%	from 22.10% to 30.45% or 51.9€/100l	New wine law doesn't require expensive testing for wines that come from Europe.	Consumption of quality wines is expected to grow with standard of living.
Tree Nuts	without domestic production 1.610MT	12.10%	from 2% to 15%	no	Grading and quantity of domestic production is insufficient.
Rice	10,140 MT	14.71%	2%	Transshipments from Europe	Croatia has no domestic production.
Poultry Meat only MDM	2,094 MT	310.21%	from 20% or 5+51.5€/100kg Max 27.8% to 10+145€/100kg Max 48.2%	U.S. suppliers are being shut out of the MDM market due to E.U. –related phytosanitary restrictions.	Negligible domestic production of MDM.
Beef	55,000MT	-87.95% drop in imports was due to BSE issues	from 8 + 78.0€/100kg Max 40% to 8.8 +117.2€/100kg	Certificate of meat quality must contain statement that cattle wasn't fed with protein of animal origin.	Croatia has a shortage since many import sources have been abandoned because of BSE issue.

V. Key Contacts and Further Information

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Appendix I. Statistics

A. Key Trade & Demographic Information

CROATIA

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries ($Mil) / US Market Share %	2001	812 / 2%
Consumer Food Imports From All Countries ($Mil.) / US Market Share %	2001	498 / 2%
Edible Fishery imports From All Countries ($Mil) / US Market Share %	2001	57 / 4%
Total Population (Millions) / Annual Growth Rate per 1000 Inhabitants	2001	4.4 / -1.9
Urban population (Millions) / Annual Growth rate (%)	2001	3.0 / n.a.
Number of Major Metropolitan Areas	2001	1
Size of the Middle Class (Millions) / Growth Rate (%)		n.a.
Per Capita Gross Domestic Product (US Dollars)	2002	$5,057
Unemployment Rate (%)	2002 2002	21.5%* 14.8%**
Per capita Food Expenditures (US Dollars)	2001	$858.61
Percent of Female Population Employed	2002	15.8%**
Exchange Rate (US$1 = X.X local currency)[5/]	2003 (average for first five months)	$1=6.95Kn

* Local methodology

**ILO %

5/ dollar slide from $1=8.34

Table B Consumer Food & Edible Fishery Products

Croatia Imports of Agriculture, Fish & Forestry Products
(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S Marke	
	1999	2000	2001	1999	2000	2001	1999	200
BULK AGRICULTURAL TOTAL	93	87	124	1	1	3	0.67%	0.4
Wheat	1	1	1	0	0	0	0%	0
Coarse Grains	6	3	31	1	1	1	0.12%	0.7
Rice	5	5	5	1	1	1	0.59%	[illegible]
Soybeans	10	7	18	0	0	1	0%	0
Other Oilseeds	2	2	2	1	1	1	10%	0
Cotton	4	5	5	1	0	0	6%	0
Tobacco	16	20	19	1	0	3	0.53%	0
Rubber & Allied Gums	1	1	1	1	1	1	2%	0.3
Raw Coffee	39	32	22	0	0	1	0%	0
Cocoa Beans	6	5	5	0	0	0	0%	0
Tea (Incl. Herb Tea)	1	1	1	1	0	1	0.68%	0
Raw Beet & Cane Sugar	1	1	10	0	1	0	0%	[illegible]
Pulses	2	2	3	1	1	1	4%	[illegible]
Peanuts	2	1	1	0	0	0	0%	0
Other Bulk Commodities	1	1	1	1	0	1	0.43%	0
INTERMEDIATE AGRICULTURAL TOTAL	150	168	189	1	1	2	0.86%	0.8
Wheat Flour	1	1	1	0	0	0	0%	0
Soybean Meal	14	16	24	1	1	1	3%	0.8
Soybean Oil	1	2	1	0	0	0	0%	0
Vegetable Oils (Excl. Soybean Oil)	20	12	16	1	1	1	0.06%	0.1
Feeds & Fodders (Excl. Pet Foods)	13	12	16	1	1	1	0.73%	0.4
Live Animals	29	46	32	0	0	1	0%	0
Hides & Skins	3	11	13	0	1	1	0%	0.6
Animal Fats	1	1	2	0	0	1	0%	0
Planting Seeds	5	5	8	1	1	1	1%	[illegible]
Sugars, Sweeteners, & Beverage Bases	7	11	23	0	0	1	0%	0
Essential Oils	15	15	18	1	1	1	0.02%	0.0
Other Intermediate Products	41	35	36	1	1	1	2%	[illegible]
CONSUMER-ORIENTED AGRICULTURAL TOTAL	431	416	498	4	4	8	0.93%	0.8
Snack Foods (Excl. Nuts)	36	33	44	1	1	1	0.24%	0.1
Breakfast Cereals & Pancake Mix	4	4	5	1	0	0	0.21%	0
Red Meats, Fresh/Chilled/Frozen	29	38	41	0	0	1	0%	0
Red Meats, Prepared/Preserved	21	19	20	0	0	1	0%	0
Poultry Meat	2	2	4	1	0	1	0.59%	0
Dairy Products (Excl. Cheese)	38	44	44	1	1	0	0.16%	0.0
Cheese	11	11	19	0	1	0	0%	0.3
Eggs & Products	1	1	3	1	1	1	22%	1
Fresh Fruit	53	45	56	0	1	1	0%	0.0
Fresh Vegetables	18	17	23	1	1	1	0.27%	0.1

Processed Fruit & Vegetables	46	45	50	1	1	1	0.67%	0.6
Fruit & Vegetable Juices	12	11	11	1	1	1	0.03%	0.5
Tree Nuts	5	4	5	1	1	1	11%	1
Wine & Beer	10	10	16	1	1	1	0.36%	0.5
Nursery Products & Cut Flowers	16	13	16	1	1	0	0.24%	0.0
Pet Foods (Dog & Cat Food)	11	11	13	1	1	1	6%	0.9
Other Consumer-Oriented Products	118	110	130	2	2	4	2%	
FOREST PRODUCTS (EXCL. PULP & PAPER)	94	98	121	1	1	1	2%	
Logs & Chips	3	5	5	0	0	0	0%	
Hardwood Lumber	4	5	7	0	1	1	0%	0.6
Softwood and Treated Lumber	28	23	29	1	1	1	0.56%	0.0
Panel Products (Incl. Plywood)	33	41	48	1	1	1	4%	
Other Value-Added Wood Products	27	25	32	1	1	1	0.25%	0.0
FISH & SEAFOOD PRODUCTS	29	33	57	1	1	2	2%	
Salmon	1	1	1	1	1	1	3%	
Surimi	1	1	1	0	0	1	0%	
Crustaceans	2	2	3	0	0	0	0%	
Groundfish & Flatfish	6	6	8	1	1	1	3%	0.0
Molluscs	8	8	9	1	1	1	5%	1
Other Fishery Products	12	17	36	0	1	1	0%	
AGRICULTURAL PRODUCTS TOTAL	674	670	812	6	5	13	0.87%	0.7
AGRICULTURAL, FISH & FORESTRY TOTAL	797	802	989	8	8	16	1%	0.9

NA - Data not available (not reported) ***Data: Harmonized Tariff Schedule (HS 6 Digit)***
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical

Table C Top 15 Suppliers of Consumer Foods & Edible Fishery Products

FISH & SEAFOOD PRODUCTS - 700

Reporting Country: Croatia Top 15 Ranking	Import		
	1999	2000	2001
	1000$	1000$	1000$
Spain	7,288	7,541	18,943
Italy	4,163	4,528	6,095
Denmark	909	1,487	5,626
Sweden	847	1,419	3,094
Norway	2,278	1,843	2,684
China (Peoples Republic of)	842	1,837	2,609
United States	603	1,134	2,273
Argentina	2,813	1,687	2,078
Thailand	406	368	1,752
Germany	1,214	1,128	1,405
Netherlands	1,340	682	1,187

Iceland	1,061	993	1,174
Slovenia	1,103	1,123	1,164
Mauritania	30	520	849
Morocco	51	84	513
Other	3,613	6,743	5,128
World	28,563	33,119	56,571

NA - Data not available (not reported)   Data: Harmonized Tariff Schedule (HS 6 Digit)
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical (

AGRICULTURAL, FISH & FORESTRY TOTAL - 900

Reporting Country: Croatia Top 15 Ranking	**Import**		
	1999	**2000**	**2001**
	1000$	**1000$**	**1000$**
Italy	95,164	97,957	108,800
Slovenia	102,999	100,292	107,994
Hungary	65,341	74,101	103,275
Austria	67,594	68,599	97,471
Germany	67,741	66,032	85,357
Brazil	50,444	49,728	63,878
Netherlands	36,999	36,775	38,475
Spain	21,163	22,746	34,153
Bosnia-Herzegovina	35,298	19,537	33,651
France	31,345	21,338	27,669
Poland	16,991	22,068	25,705
Czech Republic	10,706	16,194	22,163
Yugoslavia	2,375	5,941	17,749
Denmark	7,791	10,979	16,416
United States	7,974	7,939	15,922
Other	176,744	181,246	190,553
World	796,741	801,543	989,333

NA - Data not available (not reported)   Data: Harmonized Tariff Schedule (HS 6 Digit)
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical (